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# Foreign Crops and MARKETS



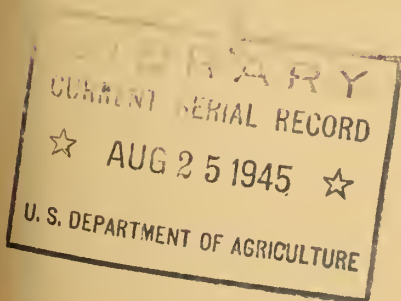
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## L A T E N E W S

Argentina's third official estimate places the 1944-45 cotton crop at 72,300 metric tons, equivalent to 333,000 bales of 478 pounds. This represents an increase of 16.6 percent over the previous estimate of the crop. The improved outlook is attributed to favorable weather conditions since the last estimate. The trade estimate is slightly higher.

Czechoslovak public food rations have been increased substantially. Effective for the 4-week period beginning August 20 the Government has approved the following increases in the public food rations: From 16 pounds of bread to 27 pounds; from 26 ounces of meat to 47 ounces; from 3 ounces of fat to 6 ounces. It was announced also that during the succeeding 4 weeks the meat ration would be further increased from 47 ounces to 54 ounces, and fat from 6 ounces to 14 ounces. After 8 weeks there is to be a further increase in the meat and fat ration.

Danish crop conditions on August 1 in percent of normal, corresponding figures for 1944 being shown in parentheses, were reported as follows: Wheat 96 (100); rye 91 (99); barley 96 (101); oats 97 (100); mixed grain 98 (100); legumes 98 (98); potatoes 95 (92); mangels 92 (85); rutabagas 96 (95); turnips 95 (94); carrots 93 (89); sugar beets for feed 93 (86); sugar beets for sugar 96 (93); lucerne 98 (97); sown hay 101 (111); wild hay 93 (98); and pastures 99 (100).

The 1945 grain area and the production forecast were reported as follows; Wheat, 214,977 acres and 9,994,000 bushels; rye, 392,889 acres and 12,007,000 bushels; barley, 1,103,226 acres and 55,299,000 bushels; oats, 827,785 acres and 66,551,000 bushels; and mixed grain, 761,068 acres and 828,000 short tons.

The Philippine sugar industry was granted a 4,500,000 peso (\$2,250,000) credit for loans to planters. The diversion of sugar to alcohol production continues unrestricted. It is estimated that 20,000 tons of sugar plus substantial quantities of rice and corn have been turned into alcohol during the past three months.



ARGENTINA'S MEAT OUTPUT IN 1945 TO BE SMALLER THAN 1944 RECORD LEVEL 1/

Argentina's meat output will show a fairly substantial decline in 1945. A new high level was reached in 1944 chiefly because of the wartime expansion in hogs and sheep. Total production and export of beef have been on a definitely lower level since the early years of the war, and the increase in exports in 1944 was made partly at the expense of stocks and partly at the expense of domestic consumption. Argentineans, however, are eating more meat per capita than the people of any other country in the world.

Argentine Meat Output in 1945: Poorer production prospects for 1945 indicate that total meat output will be around 12 percent less than the record level of 1944. At the same time, beef production is expected to show a decrease of about 10 percent from the 1944 level, mutton and lamb will be about the same as last year, while pork is expected to fall off from 20 to 25 percent. Pasture and livestock have made slow recovery from the summer drought of 1944-45 (December-February) in the cattle zones which is expected to have an even more serious effect on curtailing beef production and export than had the 1942-43 drought. In addition, an attack of yellowish green aphid is also reported to have caused severe damage to grain stands being used for winter pasture.

Due partly to the effect of the drought and partly to a 3 month (April-June) strike at freezing and chilling companies, beef exports in the first half of the year were only 55 percent of shipments in the corresponding period last year.

At the beginning of 1945, the number of cattle on pastures is believed to have been about the same as a year earlier. Therefore, because of the reduced slaughter in the first half of this year, marketings are expected to be larger than in the corresponding period in 1944 for the remainder of this year, although latest cabled information indicates that the slaughter will vary considerably from month to month.

Slaughter in July and August was expected to be heavier than in those months a year earlier with lighter slaughter in prospect from mid-August through October. In the last 2 months of the year it will again be heavier. An increase of 10 to 15 percent is expected for the months November-March above the same months of 1944-45. At the same time, the average dressed weight of steers slaughtered in freezing and processing plants is expected to be 44 to 55 pounds per head heavier than in the same months in 1944-45. The average dressed weight of steers killed at packing plants was 626 pounds per head in the 6-month period, October to March 1944-45.

The recent increase granted in the official prices for chiller and freezer steers in the heavier categories by the Argentine Meat Board will

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

encourage feeding to heavier weights. Hog producers have been demanding higher prices, and if these are granted in time to encourage feeding to heavier weights, the decrease in pork production may possibly be only 20 percent instead of 25 percent.

Meat Production in 1944. In 1944, despite only a slight increase in beef and veal production, pork, mutton, and lamb increased enough to bring the total meat output to the highest level on record, or 5,251 million pounds. This was 5 percent above the previous record reached in 1941 when beef and veal showed such a substantial increase. The large wartime expansion of the hog industry and the decrease in cattle production is brought out by the fact that in 1944, when meat production reached 5,251 million pounds, beef and veal represented only 70 percent of the total and pork 16 percent, whereas in 1938 when production totaled 4,653 million pounds, beef and veal represented 86 percent, and pork only 5 percent of the total.

ARGENTINA: Estimated production, export and apparent consumption of meats, dressed weight basis, 1934-1944

Year	Total Meat a/			
	Production	Exports b/	Consumption	
			Total	Per Capita
	Million pounds	Million pounds	Million pounds	Pounds
Average 1934-1938.....	4,459	1,460	2,999	242.1
Annual-				
1941.....	5,142	1,912	3,230	242.4
1943.....	4,951	1,991	2,960	215.9
1944 b/ .....	5,251	2,428	2,823	203.0

Estimates based on official slaughter and export figures.

a/ Excludes meat from hogs slaughtered on farms for farm consumption.

b/ Preliminary.

Heavy slaughter of cattle for export in the early war years and the severe drought of 1942-43 combined to reduce the numbers of marketable cattle in 1943 and 1944. The severe summer drought of 1944-45 will further adversely affect production in 1945. Cattle numbered 31,460,000 in September 1942, compared with 33,750,000 in the preceding year. A further reduction has probably occurred since then. There has been a progressive decline in cattle slaughter from the wartime high of 7,578,000 in 1941 to 6,468,000 in 1944. Heavier average dressed weights of cattle in 1944, however, resulted in a slight increase in beef and veal production over 1943, despite the reduction in the number slaughtered. During wartime there has been a tendency to increase weights in order to furnish as much meat as possible for domestic consumption and for export. The price policy of the Argentine Meat Board has encouraged this tendency.

Since 1941, the increased production of hogs and sheep and lambs has largely offset the decrease in cattle production. Hog numbers expanded during the war period as a result of abundant feed supplies and a good demand for meat both for export and for domestic consumption. Num-



bers in 1944 are estimated to have reached 7,500,000, which is 91 percent above the 1936-1940 average. Hog numbers are currently estimated at 7,000,000 head. With a sharp reduction in the 1944-45 corn crop and with more favorable prospects for exporting grain, the hog-corn ratio will be less favorable in 1945, with a further reduction in prospect.

The number of sheep in 1942 has reached 50,902,000, compared with an average of 44,900,000 for the years 1936-1940. This is the largest number reported since the census of 1908.

The large accumulation of coarse crossbred wool on hand during the past 2 years, however, has probably acted as a check to further expansion. In the past 2 years, the heavy slaughter of sheep may indicate a tendency to liquidate. Reported slaughter in 1944 reached 12,497,000 head, compared with 11,900,370 in 1943 and an average of 7,023,000 for the 5 years 1934-1938.

Meat Exports. Meat exports from Argentina in 1945 are not expected to reach the record total of 2,400 million pounds dressed carcass equivalent exported in 1944.

Beef and veal exports in 1944, including canned, dehydrated or meat otherwise processed, reached 1,582 million pounds, dressed carcass equivalent. This was an increase of 14 percent above the reduced exports of 1943 and about twice as large as the prewar average (1934-1938). Pork exports in 1944 were 57 percent above 1943, while exports of mutton and lamb increased 23 percent. Pork exports were over 8 times the prewar average, while exports of mutton and lamb were about 4 times as large.

Destination of Exports. By far the most important destination of Argentine beef during the war time has been the United Kingdom. On an actual product weight basis, exports of meat, including 55 million pounds of offals, reached 1,629 million pounds in 1944, 82 percent of which went to the United Kingdom. That country was the most important market for Argentine beef in the prewar period. Continental Europe, especially Germany and Italy, imported a large share of the frozen or continental type in the prewar years with the United Kingdom taking practically all of the chilled type, which is the highest grade of Argentine beef. Only a relatively small percentage of Argentine meat exports go to the United States, and that is in the form of canned meat. The reason for this is that the order of September 26, 1926, issued by the Secretary of Agriculture to prevent the introduction into the United States of rinderpest and foot and mouth disease is still in effect. This order prevents the entry into the United States of any fresh, chilled or frozen beef, veal, mutton, lamb, or pork from specified countries where this disease exist, and Argentina is listed among such countries. Therefore, as the bulk of Argentine meat is exported in a chilled or frozen condition this precludes the United States from being a more important importer of Argentine meats.

Live Animal Exports. Argentina exports live animals in addition to its trade in meat. Chile, Paraguay, and Bolivia were the chief destina-

tions for exports in 1944. The Chilean Territory of Magallanes is the chief destination of sheep and lamb exports from the Patagonian section of Argentina.

In 1944, the number of live hogs exported numbered 35,000 against 24,000 in 1943, 7,000 in 1942, and only 2,000 in 1938.

Domestic Consumption of Meat. Although Argentineans still consume more meat per capita than any other country, there has been a reduction in both total and per capita consumption since 1942. Apparent quantities of meat available for domestic consumption in 1944, that is, a total of 2823 million pounds was the smallest in 10 years while per capita consumption showed an even greater reduction. An apparent shift in consumption during the recent war years from beef and veal to pork is indicated.

Esther H. Johnson

## COMMODITY DEVELOPMENTS

### GRAINS, GRAIN PRODUCTS, AND FEEDS

#### CANADIAN GRAIN CONDITION DETERIORATES; WINTER GRAIN HARVESTED

The condition of the spring wheat and coarse grain crops in Canada was officially reported to have deteriorated during July. On July 31 the spring wheat condition was placed at 92 percent of the long-time average yield per acre, compared with 101 percent a month earlier and 128 percent a year ago. Improvement in the condition of all grains in the eastern Provinces was more than offset by deterioration in the Prairie Provinces, especially in Saskatchewan, the largest grain producing Province in Canada. The condition of all grains deteriorated in that Province during July, whereas all showed some improvement in Manitoba. Wheat condition registered a gain in Alberta, while feed grains deteriorated markedly during July.

The first estimate of winter grain crops places the winter wheat outturn, reported only in Ontario, at 20,777,000 bushels, or only slightly less than the large 1944 crop. The winter rye harvest, as placed at 4,274,000 bushels, is the smallest reported since 1936, and is about 25 percent less than last year's production. The decline is due to a reduction in the acreage seeded, which occurred principally in Saskatchewan.

#### ITALIAN RICE PRODUCTION DROPS SHARPLY

The 1945 Italian rice crop, forecast at 20.9 million bushels (600 million pounds milled) in July, is 45 percent of the peak outturn in 1940 and 65 percent of production last year. Military operations at planting time, with the consequent war damage to irrigation and labor



shortages, was the principal reason for the curtailment. Furthermore, lack of fertilizers is expected to reduce the yield per acre considerably below former yields.

ITALY: Rice acreage, production, trade, and apparent utilization,  
average 1935 to 1939, annual 1940 to 1945

Year	Acreage	Yield per acre	Production		Net exports		Apparent utiliza- tion
			Rough	Milled a/	a/	b/	
	1,000 acres		1,000 bushels	Million pounds	Million pounds	Million pounds	
Average -							
1935-1939 .....	362	103.9	37,620	1,100	281		819
Annual -							
1940 .....	404	112.6	45,499	1,331	207		1,124
1942 .....	398	95.0	37,820	1,106	c/ 29		d/
1945e/ .....	240	87.0	20,900	600	-		-

Compiled from official sources.

a/ In terms of milled rice equivalent to 65 percent of rough rice.

b/ For year following harvest. c/ January- June. d/ Not available.

e/ Preliminary forecast.

It is expected that very little, if any, rice will be available for export from the 1945 crop, since the harvest will be smaller than normal requirements. In addition, shortage of other cereals in Italy during the war necessitated increased rice consumption. Before and during the first years of the European war, Germany was the principal destination for rice exports, and other countries taking rice were Hungary, Austria, Yugoslavia, and France.

#### INCREASED RICE PRODUCTION PLANNED IN BRAZIL

The goal for future rice production in Sao Paulo, Brazil, was set recently at approximately 60 million bushels (1,750 million pounds milled) by the State Secretariat of Agriculture in a program designed to intensify production of 5 cereal crops in that State. Sao Paulo is now the largest rice-producing State in Brazil. As a result of the expansion in rice growing during the war and favorable weather conditions, the February-May harvest amounted to about 39 million bushels (1,140 million pounds), or more than twice the production before the war of 18 million bushels (500 million pounds), average from 1937 to 1941.

Even though the 1945 crop is estimated to be 6.2 million bushels (180 million pounds) larger than the previous record production in 1943, when it was approximately sufficient for requirements, the quantity available for export from Sao Paulo may be small. The surplus from this State may go primarily to other deficit areas in Brazil, which may result in the surplus from the State of Rio Grande do Sul being largely available for export to foreign countries.

VEGETABLE OILS AND OILSEEDSPEANUT PRICES INCREASED  
IN CUBA

Peanut prices to growers at local railroad stations were increased to 4.5 cents per Spanish pound, (1.0143 United States pound), equivalent to \$91.29 per United States short ton, effective July 30, under an official Cuban decree No. 2048. Previously the official price was 3.8 cents per Spanish pound or \$77.09 per short ton.

Although this official action came too late to influence the main 1945 crop planted last spring, the new price schedule is expected to encourage larger plantings of the small fall crop, planted principally in eastern Cuba. The 1945 production of unshelled peanuts is forecast at 57 million pounds, compared to last year's output of 50 million pounds.

The price of refined peanut oil in bulk at crushing plants remains at about 21.25 cents per pound, or 22.73 cents in 50 pound drums. The price to retailers is raised one-fourth cent to 25 cents per pound in 50 pound drums, and when sold by the retailers in consumers' containers the price is 30 cents per pound. In small containers the prices are higher; in 1 pound containers the retail price is 42 cents.

HUNGARY INCREASES  
SUNFLOWER SEED PRODUCTION

Hungary's 1945 sunflower seed crop is forecast at 187,000 short tons, compared with a prewar average (1934-1938) of 29,300 tons. Comparable figures for the intervening years are not available, but indications point to a rapid expansion of production during the years the country was under German domination.

Despite the prospects for increased sunflower production, Hungary faces an acute shortage of fats and oils. Total requirements in terms of oil are approximately 94,000 tons. Sunflower oil should supply at least 38,000 and other oilseeds possibly 6,000 tons. Animal fats, although very scarce, should make up some of the deficit. It is reported that the Russians took about half of the 1944 sunflower crop.

TOBACCOINCREASED TOBACCO PRICES  
SET FOR RIO GRANDE DO SUL

An order issued by the Coordinator of Economic Mobilization on June 27, 1945, established a schedule of prices to be paid to flue-cured tobacco producers in the State of Rio Grande do Sul, Brazil. The established prices may be increased up to 10 percent on each grade of leaf to provide for varying costs of production in different sections of the



State. The schedule of established prices, with comparisons showing farm prices in recent years, is as follows:

RIO GRANDE DO SUL: Farm price per pound for flue-cured leaf tobacco, by grade, 1942-43 to 1944-45, and prices fixed June 27, 1945

Grade	1942-43	1943-44	1944-45	Prices fixed June 27, 1945
	Cents	Cents	Cents	Cents
A .....	13.4	15.0	22.4	26.6
B .....	11.9	13.4	20.8	25.1
C .....	10.3	11.9	18.5	22.7
D .....	8.8	10.3	17.0	21.1
D <sub>2</sub> .....	8.0	9.6	15.4	20.4
E .....	7.3	8.8	13.9	18.8
F <sub>1</sub> .....	6.5	7.6	12.3	15.7
F <sub>2</sub> .....	5.2	6.0	10.0	13.3
F <sub>3</sub> .....	3.4	4.0	7.7	11.0
V .....	3.4	4.0	6.2	8.6

Compiled from Consular Sources.

The order also granted permission to Rio Grande tobacco exporters to ship about 4.1 million pounds of flue-cured leaf to foreign countries during the period June 28, 1945, to December 31, 1945. Brazilian tobacco manufacturers, however, are permitted to purchase the export quota if they are willing to meet export prices.

#### CANADA'S FLUE-CURED TOBACCO EXPORTS LARGER

Canada's exports of flue-cured leaf tobacco during the first 5 months of 1945 amounted to 10.5 million pounds, or nearly equal to the 10.9 million pounds exported during the entire calendar year 1944. If the authorized quantity of 16 million pounds of flue-cured is exported during 1945, this year's exports will be the largest since 1939, when the total was 28.7 million pounds.

Although the ban against the importation of manufactured tobacco from non-sterling countries was removed in August 1944, imports of American cigarettes into Canada have continued to be insignificant. The present high tariffs virtually eliminate foreign cigarettes from the market even though the ban on their importation has been removed. Smoking tobacco imports from the United States, however, are currently running about double those during the immediate prewar period. Imports of leaf tobacco continue to be confined largely to cigar and Oriental types with some increase in cigar leaf takings. Adequate supplies of domestic leaf tobacco and high prices for foreign leaf are acting as restrictive influences on imports.



COTTON AND OTHER FIBERS

## WAR DAMAGE IMPEDES

## NETHERLANDS COTTON MILL OPERATIONS

Extensive disruption of transportation facilities, critical shortages of labor and fuel, and lack of raw materials have combined to hamper early resumption of cotton mill operations in the Netherlands. Destruction of some mill properties and damage to others are also contributing causes.

A recent survey of the cotton mill industry in the Netherlands indicates that one of the 21 spinning mills was completely destroyed and 5 others were damaged during the war. About 11 percent of the 1,241,000 spindles in operation in 1939 were destroyed and 12 percent damaged leaving a total of 955,500 spindles in condition for immediate operation. The damaged spindles cannot be repaired until spare parts are made available, and this is expected to take some time. The spinning industry consumed about 265,000 bales of cotton annually in prewar years, reaching 294,000 in 1939. In addition, about 22,000 short tons of cotton yarn, equal to about 100,000 bales of cotton, were imported each year, mostly from the United Kingdom with smaller amounts from Belgium and Czechoslovakia. Cotton yarn and cloth exports, chiefly to the Netherlands East Indies, represented about 30 percent of the total output.

Many of the spinning mills have looms and weave some yarn, but there are about 100 weaving mills with 50,000 looms. Two weaving mills with a total of 1,600 looms were completely destroyed and several others were damaged. It is estimated that 86 percent of the looms are intact and repairs will raise this figure to 92 percent within a few months.

The Germans closed down about 80 percent of the textile industry during the 4 years of occupation, and the remainder operated to a very limited extent on staple fiber supplies from German sources. Production of staple fiber yarn averaged about 5,000 tons annually during the war but probably does not exceed 100 tons monthly at present. There was no domestic production prior to the German occupation and the one plant erected at Arnhem was partly destroyed and later dismantled by the German occupation forces. By the middle of July, no cotton had arrived in the country, but about 45,000 bales of American cotton were reported to be in process of shipment.

There are several other major difficulties to be overcome, however, even if adequate supplies of cotton were made available in the near future. There is reported to be a definite deterioration both in the physical ability and willingness of labor to return to regular work. Malnutrition, diversion to other industries, and migrations or deportations appear to be the chief causes for labor scarcity.

The lack of coal for fuel is reported to be a serious problem impeding the resumption of mill operations as current coal production represents

only about 35 percent of the country's prewar requirements or 45 percent of current minimum needs. Temporary relief is expected in late August or September when power lines will be connected with those from Germany and Belgium.

Transportation by water comprised about 60 percent of the total in 1939. Railways provided 25 percent and trucks 15 percent. Many of the principal waterways are blocked by bridges and locks damaged or destroyed by bombs. Railways, both electric and steam operated, are practically all out of use because of destroyed bridges, lack of coal or electric power, and loss of equipment. Major repairs are expected to be completed by September and no sizable movement of cotton or textiles is anticipated before that time in any event.

COTTON: Price of certain foreign growths  
and qualities in specified markets.

Market location, kind and quality	Date: 1945	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)	:	Kantar	:	:	:
Ashmouni, F.G.F.....	8-2:	99.05 lbs.	Tallaris:	35.25	29.44
Giza 7, F.G.F.....	8-2:	99.05 lbs.	Tallaris:	-	-
Karnak, F.G.F.....	8-2:	99.05 lbs.	Tallaris:	39.00	32.57
Bombay (Sept '45 futures):	:	Candy	:	:	:
Jarila.....	8-3:	784 lbs.	Rupee	426.00	16.37
Bombay (spot)	:	Candy	:	:	:
Kampala, East African....	8-3:	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)	:	Metric ton	:	:	:
Type B.....	8-4:	2204.6 lbs.	Peso	1300.00	17.56
Lima (spot)	:	Sp. Quintal	:	:	:
Tanguis, Type 5.....	8-4:	101.4 lbs.	Sol	107.00	16.23
Recife (spot)	:	Arroba	:	:	:
Mata, Type 5.....	8-3:	33.07 lbs.	Cruzeiro:	80.00	13.17
Sertao, Type 5.....	8-3:	33.07 lbs.	Cruzeiro:	85.00	13.96
Sao Paulo (spot)	:	Arroba	:	:	:
Sao Paulo, Type 5.....	8-3:	33.07 lbs.	Cruzeiro:	89.00	14.65
Torreón (spot)	:	Sp. Quintal	:	:	:
Middling, 15/16".....	8-4:	101.4 lbs.	Peso	88.25	17.91
	:	:	:	:	:

Compiled from weekly cables from representatives abroad.

FRUITS, VEGETABLES, AND NUTS

MEXICAN BANANA  
PRODUCTION INCREASES

The 1945 production of bananas in Mexico is expected to be slightly larger than last year's total production of 19,421,000 bunches of 50 pounds. Plantings have been increased in spite of transportation difficulties. Prolonged drought, which is now in its eighth month in many parts of Mexico, has



not greatly affected banana production, particularly in the principal producing States of Chiapas and Tabasco. Rainfall in these States has been only slightly below normal during the drought period, and decreases in production, as a result of lack of rain, have been offset by the apparent check of Sigatoka disease. Because of below-normal rainfall growers have not had to spray as frequently, and it is believed that by the time spraying activities are resumed on a full-scale basis, stocks of chemicals and spray will be larger than at any time during the past 2 years.

Production in 1944 is estimated at 19,421,000 bunches of 50 pounds. Of this amount, Roatans accounted for 13,032,000 bunches and "various bananas" including Cavendish, Finger bananas, plantains, and others, the remainder or 6,389,000 bunches. Decrease in production of 480,000 bunches from the 1943 total of 19,901,000 bunches is attributed to heavy rains and high winds in September, which were particularly damaging as they came prior to the peak season of harvest. Exports during 1944 amounted to 3,487,000 bunches of 50 pounds, a decrease of about 20 percent from the 1943 exports of 4,316,000. Exports of all types during the first 5 months of 1945 have surpassed the corresponding months of the previous year and will probably reach or surpass the exports made in 1943.